2013 TAX YEAR INTERVIEW
CLIENT NAME: _____

YES	NO

INCOME INFO:

Mention Refer-A-Friend

Wages? Tips? # _____
Interest? # _____ In 2013, did you have a financial interest in or signature authority over a foreign financial account ie:bank account, security account, brokerage account or joint account, US bank account located abroad?
If yes, is total value > $10,000 name of country _____
During 2013, did you receive a distribution from or grantor of or transferor to a foreign trust in excess of $10,000?
Dividends? # _____
Refunds State/Local Income Tax? Only if itemized in 2013 did you make major purchase boat, car?
Alimony Received?
Self-employment business income? If yes, fill out Schedule C worksheet
Capital Gains/Losses? (get all buy/sell dates & prices)
Distributions from Pension/Annuity/IRA, ESA,QTP or HSA? If yes, get acct bal as of 12/31/13
Rental Real Estate owned? If yes, fill out Rental Real Estate worksheet
Flow thru income - S corp/partnership? If yes, get the K1 if we are not their biz CPA
Farm income?
Unemployment Comp rec'd? # _____ If yes, any fed. Withholding?
Socal Security/Tier 1 RR retire. Income? #_____ If yes, any fed withholding?
Any cancellation of debt? Get 1099 C
Any miscellaneous income?
NJ Fair Homeowner Rebate $_____
Gambling? Lottery? Prizes? Jury pay?

Inform client about Obama Care health insurance penalty 2014 $95 per family member

DEDUCTION INFO:

Are you legally married in any state? If yes, name of spouse & social_____
Educator expenses? (pre-college teachers only) $ _____
Business Exp for Reservists, Performing $ _____
Artists, Fee-based gov't official
Contributions to health savings acct? $ _____
Moving expenses (employment related only) $ _____
For self-employed taxpayers:
Health ins premium paid? Total $ _____ **(deduct only half)**
Retirement contributions paid: $ _____ **(deduct only half)**
Paid Alimony? (get s.s.# of recipient)
IRA deduction? Taxpayer $ _____ Spouse $ _____
-**if no, is client interested if qualifies and it helps?**
-if interested, we will let client know tax savings before return is processed
Student loan interest? $_____
Tuition and fees paid? $ _____ (Do both Education Fees Summary and Launch Education Optimizer) determine which is better tax effect)
Domestic production activities?(architect, engineer, contractor, etc.)
- If yes, get worksheet

any **Dependents** in College? (under 23yr)
Y N
(Check off on NJ-1040)

ITEMIZED DEDUCTIONS - Use the attached Schedule A worksheet

CREDITS:
Energy credit: energy efficient heating/cooling? _____ Doors/windows $_____ Solar electric? _____
Did you take a residential energy credit in prior tax years 2006 - 2012? If so, how much was the credit taken?___
If taxpayer has children/other dependents:
Child or Dependent Care provided? $ _____-get payee name, address, ein
Did child receive over $1900 from interest and dividends?
-If yes, is taxpayer claiming this unearned income on this return?
Did you contribute to a HSA? If yes, single ___ family ___

FOR NEW JERSEY RESIDENTS:

Renter? Total rent paid for 2013 $ _____. Did you move during the year? When?
Medical Exp's paid $ _____ (2% cap so relevant in NJ if not able to get on federal)
If taxpayer does Std Ded, but paid RE tax, amount paid? _____

Refund method:

Up to 21 days _____ (refund thru direct deposit-need voided check)
4-6 weeks _____ (refund thru paper check)

Direct Deposit Info: Please get voided check from client
Bank Routing # _____
Bank Account # _____

Did Taxpayer pay Estimated Taxes:

Federal	1Q Date:	Amt: $_____	3Q Date:	Amt: $ _____
	2Q Date:	Amt: $_____	4Q Date:	Amt: $ _____
2013 Federal tax refund credited to 2014: $ _____				
State	1Q Date:	Amt: $_____	3Q Date:	Amt: $ _____
	2Q Date:	Amt: $_____	4Q Date:	Amt: $ _____
2013 NJ State tax refund credited to 2014: $ _____				

Filing Status:
MFJ
MFS
HH
S

Dependent of Another?
Y N